

Employees List

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Employees are individuals who work for your company and may or may not be a person who will be using Managely.

If the employee is also a Managely user, you can link the employee to the saved user to auto-fill several of the data entry fields. An employee record contains fields to track additional information that is not available on the user record.

Accessing employees from the Company Setup menu shows a list of all active employees. If an employee has been marked as a Technician or Salesperson (or both) on their employee record, the Yes/No button in the Technician and Salesperson columns indicate this.

From the Employee List, you can perform the following actions:

- Add new employees
- Edit or delete existing employees

Employees							
+ Add Employee		Export to Excel		NO Show inactive employees			
Image	Name	User	Email	Technician	Salesperson		
	Goes Here, Your Name		youremail@xxxxx.com	NO	NO	Edit	Delete 0 Docs
	Toro, Bill	tech (Smith, John)	papayt@gmail.com	YES	NO	Edit	Delete 0 Docs
	Brown, Dan		travis@alarmbiller.com	YES	YES	Edit	Delete 0 Docs
	Godby, Paul		noemail@onexcelfile.net	NO	NO	Edit	Delete 0 Docs
	Silvia, Jacob		jacobs@perennialsoftware.c...	YES	NO	Edit	Delete 0 Docs
	Marks, Michael	Michael (Marks, Michael)	mkmmarks@me.com	YES	YES	Edit	Delete 0 Docs
	Marks, Luke	Luke (Marks, Luke)	mkmmarks@me.com	YES	YES	Edit	Delete 0 Docs
	DeBaggis, Justin		justin.debaggis@boldgroup...	YES	YES	Edit	Delete 0 Docs
	McConnell, Robert	Debbie (Marks, Debbie)	RobertM@perennialsoftwar...	YES	NO	Edit	Delete 0 Docs
	Salesperson, Unassigned		xyz@xyz.com	YES	YES	Edit	Delete 0 Docs
	Papay, Travis	bestsecurity (Papay, Travis)	papayt@gmail.com	YES	YES	Edit	Delete 0 Docs
	Unassigned, Salesperson,		noreply@alarmbiller.com	NO	YES	Edit	Delete 0 Docs
1 - 47 of 47 items				Refresh			

Employees List Tools

There are several tools available to manage the Employees List.

- Export to Excel
- Filter by active or inactive employees
- Open the menu (to the right of the column name) to hide/ show columns, or filter

Export to Excel

If you are viewing a list of all active or inactive records, clicking the Export to Excel button creates an Excel file with a

listing of the records currently shown in the grid. In a few seconds, the export file will appear on the taskbar. Double-click on the file to open.

The screenshot shows the 'Employees' setup screen in the Bold Security software. The interface includes a sidebar with navigation options like 'Home', 'Customers', 'Invoices', 'Payments', 'RMR', 'Work Orders', 'Proposals', 'Calendar', 'GL', 'Reports', and 'Setup'. The 'Setup' menu is expanded, showing options like 'Company', 'Employees', 'Accounting', 'Operations', 'Items & Parts', 'Utilities', 'Uploaders', 'Exports', 'Tasks', 'Proposals', 'Other', and 'eForms'. The 'Employees' section is active, displaying a table of employee records. The table has columns for 'Image', 'Name', 'User', 'Email', 'Technician', and 'Salesperson'. A green arrow points from the 'Export to Excel' button in the top right of the grid to the 'employees.xlsx' file in the Windows taskbar.

Image	Name	User	Email	Technician	Salesperson	
	Nowland, Sharon		sharonnowland@live.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit Delete 0 Docs
	Scalia, Theresa		theresa.scalia@boldgroup.c...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete 0 Docs
	Tech, Toby		tobypl@boldgroup.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit Delete 0 Docs
	Mamnev, Dan		daniel.mamnev@boldgroup...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit Delete 0 Docs
	Fisher, Stephen	StephenF (Fisher, Stephen)	stephen.fisher@boldgroup.c...	<input type="checkbox"/>	<input type="checkbox"/>	Edit Delete 0 Docs
	Employee, Mr		stephen.fisher@boldgroup.c...	<input type="checkbox"/>	<input type="checkbox"/>	Edit Delete 0 Docs
	Johnson, Carolyn	CarolynJohnson (Johnson, Carolyn)	carolyn.johnson7757@gmail...	<input type="checkbox"/>	<input type="checkbox"/>	Edit Delete 0 Docs

Filter by Active or Inactive

At the upper right of the list is a toggle button used to show active-only or inactive-only records.

The screenshot shows the 'Employees' setup screen in the Bold Security software. The interface includes a sidebar with navigation options like 'Home', 'Customers', 'Invoices', 'Payments', 'RMR', 'Work Orders', 'Proposals', 'Calendar', 'GL', 'Reports', and 'Setup'. The 'Setup' menu is expanded, showing options like 'Company', 'Employees', 'Accounting', 'Operations', 'Items & Parts', 'Utilities', 'Uploaders', 'Exports', 'Tasks', 'Proposals', 'Other', and 'eForms'. The 'Employees' section is active, displaying a table of employee records. The table has columns for 'Image', 'Name', 'User', 'Email', 'Technician', and 'Salesperson'. A green arrow points to the 'Show inactive employees' toggle button in the top right of the grid.

Image	Name	User	Email	Technician	Salesperson	
	Goes Here, Your Name		youremail@xxxxx.com	<input type="checkbox"/>	<input type="checkbox"/>	Edit Delete 0 Docs
	Toro, Bill	tech (Smith, John)	papayt@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit Delete 0 Docs
	Brown, Dan		travisp@alarmbiller.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete 0 Docs
	Godby, Paul		noemail@onexcelfile.net	<input type="checkbox"/>	<input type="checkbox"/>	Edit Delete 0 Docs
	Papay, Travis	bestsecurity (Papay, Travis)	papayt@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete 0 Docs
	Unassigned, Salesperson,		noreply@alarmbiller.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete 0 Docs

Column Options

Clicking the kabob menu (three vertical dots) to the right of any column header displays a list of options:

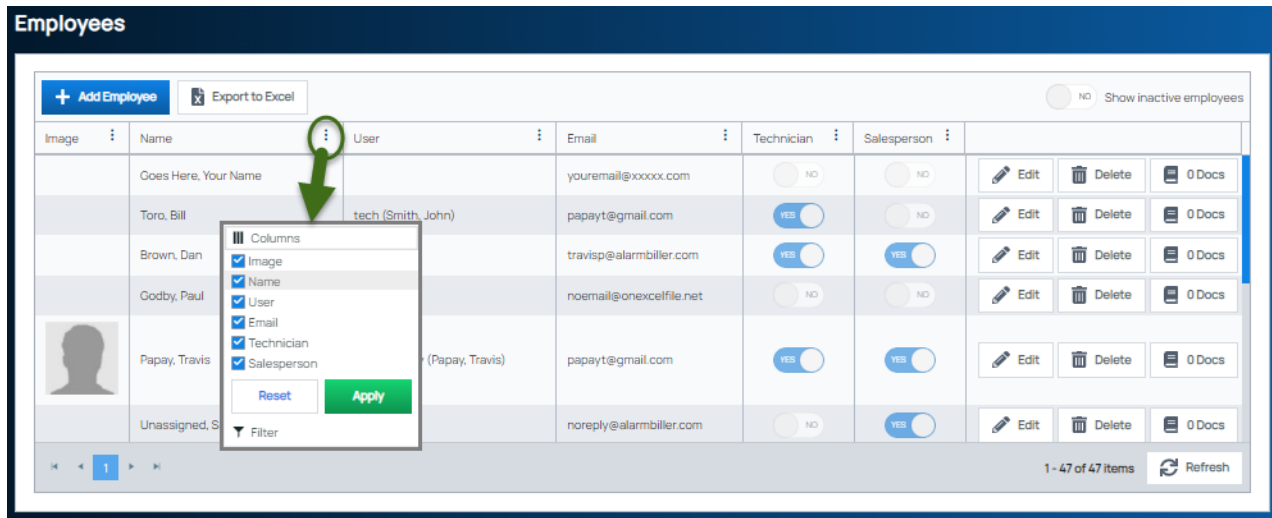
The screenshot shows the column options menu. It includes the following options:

- ↑ Sort Ascending
- ↓ Sort Descending
- Columns
- Filter

Columns

When selecting this option, a list of all available columns is displayed. If you do not want certain columns displayed in the grid, clear the checkbox to the left of each field. Click the **Apply** button when finished.

Note: If you leave this page and return again, the columns will revert to the default view.



Filter

Use this option to refine the list displayed in the grid. When clicking on Filter, a dialog box is displayed for entering criteria to find the records you want to display. The first field contains a drop-down list from which to select an operator. The list of available operators are:

- Is equal to
- Is not equal to
- Contains
- Does not contain
- Starts with
- Ends with
- Is null
- Is not null
- Is empty
- Is not empty

Select the desired operator, and then enter the criteria in the field below. Click Filter when finished. The list refreshes based on the filter criteria entered.

Note: If you leave this page and then return again, the columns will revert to the default view.

The screenshot shows the 'Employees' table in Microsoft Access. The table has columns: Image, Name, User, Email, Technician, Salesperson, and a set of action buttons (Edit, Delete, Docs). The data rows are:

Image	Name	User	Email	Technician	Salesperson	Buttons
	Goes Here, Your Name		youremail@xxxxx.com	NO	NO	Edit, Delete, 0 Docs
	Toro, Bill	tech (Smith, John)	papayt@gmail.com	YES	NO	Edit, Delete, 0 Docs
	Brown, Dan			YES	YES	Edit, Delete, 0 Docs
	Godby, Paul			NO	NO	Edit, Delete, 0 Docs
	Papay, Travis	Papay, Travis		YES	YES	Edit, Delete, 0 Docs
	Unassigned,			NO	YES	Edit, Delete, 0 Docs

Annotations in the image include:

- A green circle around the dropdown arrow in the 'Name' column header.
- A green arrow pointing from the 'Name' column header dropdown to the 'Columns' filter dialog.
- A green circle around the dropdown arrow in the 'Filter' section of the 'Columns' dialog.
- A green arrow pointing from the 'Filter' dropdown to the 'Contains' option in the list.

The 'Columns' filter dialog shows the 'Filter' section with a dropdown menu open, displaying the following options:

- Contains
- Is equal to
- Is not equal to
- Contains
- Does not contain
- Starts with
- Ends with
- Is null
- Is not null
- Is empty
- Is not empty

The 'Contains' option is highlighted. The 'Filter' section also shows a text box with 'michael' and a dropdown menu with 'And' selected. The 'Clear' and 'Filter' buttons are at the bottom of the dialog.

The screenshot shows the 'Add Employee' form with the following data:

Image	Name	User	Email	Technician	Salesperson	
	Goes Here, Your Name		youremail@xxxxx.com	<input type="radio"/> NO	<input type="radio"/> NO	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="0 Docs"/>
	Toro, Bill	tech (Smith, John)	papayt@gmail.com	<input checked="" type="radio"/> YES	<input type="radio"/> NO	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="0 Docs"/>
	Brown, Dan			<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="0 Docs"/>
	Godby, Paul			<input type="radio"/> NO	<input type="radio"/> NO	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="0 Docs"/>
	Papay, Travis	Travis (Papay, Travis)		<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="0 Docs"/>
	Unassigned,			<input type="radio"/> NO	<input checked="" type="radio"/> YES	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="0 Docs"/>

Annotations in the image include:

- A green arrow pointing to the 'Filter' button in the top right corner.
- A green arrow pointing to the 'Filter' button in the bottom left corner.
- A green arrow pointing to the 'Filter' button in the bottom right corner.
- A green arrow pointing to the 'Filter' button in the bottom right corner.